

## **INITIAL REQUEST FOR INFORMATION CalPERS Global Equity Programs**

**In order to assist the CalPERS Global Equity Unit with its initial evaluation of candidates for its programs, please provide the information outlined below.**

**Please limit your response to no more than 3 pages in total and submit it electronically to the e-mail provided below. Any deviation or omission may result in the rejection of the response.**

### **A. ORGANIZATION**

1. Legal Firm Name and Address
2. Primary Contact Information (include Phone Number and Email)
3. Fund / Product and Fund / Product AuM

### **B. INVESTMENT PROCESS**

1. Briefly describe the fund's investment strategy, investment style, and typical universe of potential investments (in terms of both geography and asset class).
2. Briefly describe the fund's decision-making and portfolio construction process.
3. Briefly describe the fund's buy and sell discipline (i.e. how entry and exit points are determined).
4. Briefly describe the fund's risk management process and the tools used in the investment process to control risk.
5. Briefly describe the market conditions in which the fund has experienced (or, in the future, would likely experience) its best and worst returns.

### **C. PERFORMANCE**

Please provide monthly return series for the fund as well as appropriate return and risk metrics and comparisons to appropriate benchmarks.

Please be aware that submission of a proposal does not guarantee a response.

Please attach the completed form and submit electronically to the [Equity Referrals Mailbox](#).